

Status Hearing Re: Filing of the First Account by Successor Conservator; Receipt of Blocked Account

Age: 64		<p>CHRIS WADE, brother, was appointed as Conservator of the Person in 1991 and RAYMOND LOVE, private professional fiduciary, was appointed Conservator of the Estate in 1991 (Mr. Wade had been subject to an LPS Conservatorship since 1981, prior to these appointments in 1991.)</p> <p>RAYMOND LOVE resigned and CHRIS WADE, brother and Conservator of the Person, was appointed as Successor Conservator of the ESTATE on 09/19/11 with deposits in a blocked account of \$101,674.67 and Bond set at \$70,000.00. Letters of Conservatorship of the Estate were issued to CHRIS WADE on 11/08/11.</p> <p>Minute Order from 06/12/12 hearing set this matter for status re Filing of the First Account by Successor Conservator and Receipt of Blocked Account on 11/16/12. Minute Order from 11/16/12 continued the matter to 01/04/12.</p> <p>First Account Current and Report of Successor Conservator filed 02/11/13 and set for hearing on 03/14/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 02/11/13</u></p> <p>See Page 1B for Eleventh & Final Account of former conservator of the Person.</p> <p>The following items are needed from successor conservator:</p> <ol style="list-style-type: none"> 1. Receipt for Blocked Account. 2. Inventory & Appraisal. <p>Note: No receipt and acknowledgment of funds placed in a blocked account has been filed by the successor conservator. Minute order from 09/19/11 states: Gary Bagdasarian asks that the successor conservator be appointed in order to obtain the blocked account. The Court approves the Petition, subject to receipt.</p> <p>The successor conservator filed a bond in the amount of \$70,000.00 and Letters were issued, but no receipt for deposit into blocked account has been filed. The Order appointing successor conservator is marked at item 20(b) stating bond of \$70,000.00 is required, and also marked at 20(c) stating deposits are ordered to be placed in a blocked account; however, no dollar amount or institution is specified.</p>
Cont. from 111612, 010413, 021113			
Aff.Sub.Wit.			
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Inventory	x		
PTC			
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Notice of Hrg			
Aff.Mail			
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Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/26/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1A - Wade</p>	

(1) Eleventh and Final Account and Report of Former Successor Conservator of Estate and (2) Petition for Compensation and Attorney's Fees [Prob. C. 2620]

Age: 64		<p>RAYMOND A. LOVE, former successor conservator of the estate, is Petitioner.</p> <p>Account period: 04/01/10 – 01/12/12</p> <table> <tr> <td>Accounting</td> <td>-</td> <td>\$239,812.55</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$142,077.26</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$2,000.00</td> </tr> </table> <p>Conservator - \$3,396.00 (per itemization for 19.6 hrs. @ \$120/hr. and 13.92 hrs. @ \$75/hr.)</p> <p>Attorney - \$2,000.00 (per Local Rule)</p> <p>Petitioner prays for an Order:</p> <ol style="list-style-type: none"> 1. Approving, allowing and settling the eleventh and final account; 2. Authorizing the conservator and attorney fees and commissions; and 3. Exonerating and discharging the former conservator's bond. <p>Court Investigator Samantha Henson filed a report on 12/03/12.</p> <p>Declaration Clarifying Raymond A. Love's Compensation Request for the Eleventh and Final Account period filed 02/22/13 states: The previous declaration of Mr. Love contained many errors, however, the amount requested in the prayer \$3,396.00 is correct and is the amount being requested that the court approve.</p>	Accounting	-	\$239,812.55	Beginning POH	-	\$142,077.26	Ending POH	-	\$2,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 02/11/13</u></p>
Accounting	-		\$239,812.55									
Beginning POH	-		\$142,077.26									
Ending POH	-		\$2,000.00									
Cont. from 021113												
	Aff.Sub.Wit.											
✓	Verified											
	Inventory											
	PTC											
	Not.Cred.											
✓	Notice of Hrg											
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	Duties/Supp											
	Objections											
	Video Receipt											
✓	CI Report											
✓	2620(c)											
✓	Order											
	Aff. Posting											
	Status Rpt											
	UCCJEA											
	Citation											
	FTB Notice											
		<p>Reviewed by: JF</p> <p>Reviewed on: 02/26/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1B - Wade</p>										

(1) Verified Sixth and Final Account and Report of Conservator of the Person and Estate of Conservatee and (2) Petition for Discharge of Conservator on Final Account (Prob. C. 2620)

DOD: 4-19-04		<p>STEPHEN RONALD CLOUD, brother and Conservator of the Person and Estate, is Petitioner. Mr. Cloud was originally appointed on 5-14-92 as a Co-Conservator with his father. After his father's death, he continued as sole Successor Conservator.</p> <p>Account period: 6-30-02 through 4-19-04</p> <p>Accounting: \$6,161,806.23 Beginning POH: \$2,578,039.04 Ending POH: \$6,651,121.65 (Less Liabilities: \$1,104,424.00) Ending POH: \$5,546,697.65</p> <p>Account period: 4-20-04 through 9-30-12</p> <p>Accounting: \$8,568,524.54 Beginning POH: \$5,546,697.65 Ending POH: \$6,511,093.10 (Less Liabilities: \$1,505,118.00) Ending POH: \$5,005,975.10 (\$1,961,471.54 cash plus non-cash assets including notes receivable, business shares, partnership interests, debt instruments, real property, accrued income, and retirement accounts.)</p> <p>Petitioner prays that:</p> <ol style="list-style-type: none"> 1. Notice of hearing of this Account, Report and Petition be given as required by law; 2. That the Court make an Order allowing and settling the account and report of the Conservator in all respects as filed; 3. The Court authorize Petitioner to repay from the Conservatorship Estate to the trustee of the Stephen Ronald Cloud, Jr., and Ryan John Cloud Irrevocable Trusts the sum of \$1,505,118.00, which represents the amount of Estate Taxes paid by the above-mentioned Trusts for the benefit of the Conservatee; 4. The Court authorize and direct the Conservator to deliver the property remaining in his possession to himself as Executor of the Estate of Rhonda Jane Cloud, and that on delivering the property and filing Petition for Final Discharge, together with proper receipts, the Conservator of the Person and Estate be discharged and surety on any bond be discharged; and 5. Other relief be granted that the Court considers proper. <p style="text-align: center;"><u>SEE ADDITIONAL PAGES</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 1-14-13: Ms. Sanoian objects to the accounting. Ms. Sanoian is directed to submit her proposed objections to Mr. Perkins by 2-1-13. Matter continued to 2-11-13.</p> <p>Minute Order 2-11-13: Ms. Sanoian informs the Court that there may be a possible resolution on the outstanding issues. Ms. Sanoian requests a continuance.</p> <p>As of 2-27-13, nothing further has been filed.</p> <p>Note: Petitioner is also executor of the estate in 06CEPR00768. See Page 14 (Status hearing).</p>	
Cont. from 121312, 011413, 021113				
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Reviewed by: skc

Reviewed on: 2-27-13

Updates:

Recommendation:

File 2 - Cloud

Page 2**Petitioner states:**

- Conservatee was Petitioner's sister and the last survivor of Petitioner's family. After her death, Petitioner became despondent and was not able to address the myriad of details associated with the termination of the conservatorship and the probate of the Conservatee's estate.
- At hearing on the accounting on 3-8-11, Attorney Janet Wright appeared on behalf of Mrs. Elaine Cloud and informed the Court that her client had filed for legal separation from Petitioner and Mrs. Cloud wanted to be sure that Petitioner was not waiving certain rights to monies owed by the conservatorship estate to Petitioner. (He has not.)
- At a subsequent hearing, Attorney Joanne Sanoian appeared on behalf of Steven Cloud, Jr., who is a beneficiary of the probate estate, and stated that her client might retain a forensic accountant in this matter.
- Due to Petitioner's pending divorce proceedings, and the result of the work of a forensic accountant in that matter, continuance was granted because such work might answer some of Steven Cloud, Jr.'s questions.
- Because the additional information from other sources developed slowly, on 6-21-12, the Court dismissed the accounting petition with instructions to re-file. Petitioner has now incorporated the information which was made available from review of information in the family law proceeding.
- Since Conservatee's death (DOD: 4-19-04), Petitioner has used his own funds to pay expenses of the estate.
- During the existence of the conservatorship estate, it was common practice for the conservators to directly pay the obligations of the conservatorship estate with the expectation of repayment. In addition, the trustee of certain irrevocable trusts created FBO the Conservatee's nephews, who are the ultimate beneficiaries of the conservatorship estate, advanced the Conservatorship Estate monies to pay the state and federal taxes due at the Conservatee's death.
- To the best of Petitioner's knowledge, all intra-family transactions are accounted for in this accounting. Many of these transactions occurred prior to the Conservatee's death. As a result, the Conservatorship Estate consists of monies payable to the Conservatorship Estate by Petitioner and by closely held businesses of which Conservatee was a co-owner or co-shareholder. These monies payable are set forth in Schedule E on Exhibit B. In addition, there is an obligation that the Conservatorship Estate owes to the irrevocable trusts for the nephews.
- The beneficiaries of the Conservatee's probate estate will be two testamentary trusts created under the Conservatee's will. This Final Account shows distribution of approx. \$1,779,985.14 to the trustee of the trusts, which was made in part to repay the trusts for the monies the trusts advanced to pay the Conservatee's estate taxes. On or about 6-27-11, the trustee returned the distributions.
- Petitioner has filed a corrected I&A in this Conservatorship Estate matter, removing an asset that was mistakenly included twice on prior inventories.
- Petitioner was appointed Executor of the Estate of Rhonda Jane Cloud on 8-29-06 in 06CEPR00786.

Atty Magness, Marcus D., of Gilmore, Wood, Vinnard & Magness (for Petitioner Anna Foster)

Report of Sale and Petition for Order Confirming Sale of Real Property

DOD: 2/16/2001			ANNA N. FOSTER , daughter and Administrator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: 1. Item 4(a) of the <i>Petition</i> does not state the manner of vesting title to the purchasers. 2. Need mandatory-use Judicial Council form <i>Order Confirming Sale of Real Property</i> , containing the legal description of the real property, and the manner of vesting title to the purchasers.
Cont. from			Sale price - \$51,000.00		
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	Overbid - \$54,000.00		
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Reappraisal	<input type="checkbox"/>			
<input type="checkbox"/>	PTC	<input type="checkbox"/>			
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	Reappraisal - \$50,000.00		
<input checked="" type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Aff.Mail	W/	Property - 1908 E. Belgravia Ave. Fresno, CA 93720		
<input checked="" type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
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<input type="checkbox"/>	Letters	<input type="checkbox"/>			
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	Publication - Business Journal		
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>	Buyers - Angel J. Gildo Barrueta & Gladys J. Velasco Carrilo,		
<input type="checkbox"/>	Order	X			
<input checked="" type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			
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<input type="checkbox"/>	Citation	<input type="checkbox"/>			
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	Broker - \$3,060.00 (6% payable 3% to Mark Lanier of Premier Real Estate and 3% to Buyer)		
<input type="checkbox"/>		<input type="checkbox"/>	Bond - \$100,00.00 (Proof of bond filed 5/10/2007)		

Reviewed by: LEG
Reviewed on: 2/26/13
Updates:
Recommendation:
File 3 - Foster

Atty Sanoian, Joanne (for Petitioner/guardian of the estate Katherine Ann Ikel-Thompson)

Atty Bagdasarian, Gary (for Guardians of the Person Irene and Eustolia Molina)

(1) First Account and Report of Guardian, (2) Petition for Its Settlement, for (3)
Attorney Fees and Reimbursement of Costs Advanced (2620, 2640 & 2628 Local
Rule 7.16A and CRC 7.750-7.752)

Age: 6 years		KATHERINE ANN IEKEL-THOMPSON , guardian of the estate, is petitioner. Account period: 9/18/2008 - 9/18/2012 Accounting - \$57,795.25 Beginning POH - \$56,340.56 Ending POH - \$42,205.92 All funds are in a blocked account. Attorney - \$6,684.75 (per itemization and declaration, 37.40 hours at \$200-\$300 per hour of attorney time and \$100 - \$125 per hour for paralegal time for the preparation of petition for guardianship of the person, visitation petitions, and preparation of the accounting) Costs - \$435.00 (filing fee) Petitioner prays for an Order: 1. Approving, allowing and settling the first account. 2. Authorizing the attorney fees and costs. Declaration of Attorney Sanoian in Support of Request for Attorney Fees filed on 2/14/13.	NEEDS/PROBLEMS/COMMENTS: Continued from 2/19/13. Note: If the petition is granted a status hearing will be set as follows: • Friday, November 21, 2014 at 9:00 a.m. in Department 303, for the filing of the second account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
Cont. from 021913			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail W/		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620(c)		
	Order X		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Age: 10 years		KATHERINE ANN IEKEL-THOMPSON , guardian of the estate, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 9/18/2008 - 9/18/2012	Continued from 2/19/13.
Cont. from 010813, 021913		Accounting - \$57,772.83	Note: If the petition is granted a status hearing will be set as follows: <ul style="list-style-type: none"> Friday, November 21, 2014 at 9:00 a.m. in Department 303, for the filing of the second account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$56,340.56	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$42,193.03	
<input type="checkbox"/>	Inventory	All funds are in a blocked account.	
<input type="checkbox"/>	PTC	Attorney - \$6,684.75 (per itemization and declaration, 37.40 hours at \$200-\$300 per hour of attorney time and \$100 - \$125 per hour for paralegal time for the preparation of petition for guardianship of the person, visitation petitions, and preparation of the accounting)	
<input type="checkbox"/>	Not.Cred.	Costs - \$435.00 (filing fee)	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner prays for an Order:	
<input checked="" type="checkbox"/>	Aff.Mail W/	3. Approving, allowing and settling the first account.	
<input type="checkbox"/>	Aff.Pub.	4. Authorizing the attorney fees and costs.	
<input type="checkbox"/>	Sp.Ntc.	Declaration of Attorney Sanoian in Support of Request for Attorney Fees filed on 2/14/13.	
<input type="checkbox"/>	Pers.Serv.		Reviewed by: KT
<input type="checkbox"/>	Conf. Screen		Reviewed on: 2/27/13
<input type="checkbox"/>	Letters		Updates:
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<input type="checkbox"/>	Objections		File 5 - Molina
<input type="checkbox"/>	Video Receipt		
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<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

(1) First and Final Account and Report of Conservator; Petition for Its Settlement;
 (2) for Attorney Fees; (3) for Reimbursement of Costs Advanced; (4) for
 Termination of Conservatorship; and (5) for Final Distribution [Prob. C. 2620 & 2640;
 C.R.C. 7.703(e), 7.750-7.751 & 7.754; Local Rule 7.16B(1)]

DOD: 4-2-11		DONNA BRIGGS , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Minute Order 1-14-13: Counsel is directed to submit a declaration setting forth why the fees are so expensive. <i>(See Declaration filed 2-6-13.)</i> Minute Order 2-11-13: Continued to 3-4-13. <u>The following issues remain:</u> 1. Need declaration re trust pursuant to Local Rule 7.12.5. <i>Petitioner filed a copy of the Trust Certification dated 10-18-12; however, the Court may require an original declaration pursuant to Local Rule 7.12.5.</i>
		Account period: 8-21-09 through 4-2-11	
		Accounting: \$443,988.40	
		Beginning POH: \$272,675.54	
		Ending POH: \$282,194.75	
Cont. from 011413, 021113		Account period: 4-3-11 through 9-11-12	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
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	Duties/Supp		
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	Video Receipt		
	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

7A Irene Lynn Huggins (GUARD/P)
Atty Gosselin, DeAnna (pro per –Co-Guardian-Half Sister)
Atty Gosselin, Jacob (pro per –Co-Guardian- Brother in Law)
Atty Toby, Melissa Mae (pro per – mother)
Atty Huggins, Kelly (pro per Petitioner/ Father)
Atty Attashian, Zepure (for Joyce Betz – Petitioner- Paternal grandmother)

Case No. 11CEPR00531

Petition for Termination of Guardianship

Age: 8 years		KELLY HUGGINS , father, is petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		DEANNA GOSSELIN and JACOB GOSSELIN , half-sister and brother-in-law, were appointed Co-Guardians of the Person and Letters were issued on 12/01/11. – Present in Court on 9/4/12.	Continued from 9/4/12. Minute order states the parties reach an agreement as set for the by Ms. Attashian. Ms. Attashian advises the court that the parties have also agreed to continue this matter for six months to see how things progress. Additionally the parties agree to have Irene's address remain confidential. Upon inquiry from the court each party individually agrees to the terms and conditions of the agreement. Ms. Attashian is directed to prepare the order. The matter is set for review hearing on 3/4/13. If everything is progressing well, counsel will file the necessary documents to take the hearings off calendar.
Cont. from 090412			
	Aff.Sub.Wit.	Mother: MELISSA TOBY – present in court on 9/4/12.	Page 7B is paternal grandmother's, Joyce Betz, petition for guardianship. 1. Need Order Reviewed by: KT Reviewed on: 2/27/13 Updates: Recommendation: File 7A - Huggins
✓	Verified	Paternal grandfather: Deceased	
	Inventory	Maternal grandfather: Unknown	
	PTC	Maternal grandmother: Donna Toby	
	Not.Cred.	Petitioner states: that he is currently at Chino State Prison and it is his wish that the child be placed with the grandmother, Joyce Betz, as the child and grandmother already have an established relationship. Petitioner states that the current guardian, Deanna Gosselin, has prevented him from having any contact with the minor child. He also states that the guardian has prevented him and his mother, Joyce Bertz, from having telephone contact and visits with the child. The guardian has moved without disclosing her new address. Petitioner states that the guardians have extensive criminal backgrounds and both abuse alcohol, drugs and prescription medications. Petitioner believes that the guardian, Jacob Gosselin is currently on parole. He also states that guardian, Deanna Gosselin, eldest child was taken by CPS and placed with the paternal grandparents, and the next child died from what was ruled as SIDS. The night the child passed away she had been partying and had left the child unattended, the child rolled over and suffocated. The guardians last two children, petitioner states were kidnapped by the guardians and were told that their biological father was dead, and that guardian, Jacob Gosselin, is their father. Petitioner further states that the guardians reside with Jacob Gosselin's father who has bragged on several occasions to the petitioner that he has had a sexual relationship with a minor but was never convicted.	
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	FTB Notice		
The Petitioner requests that should the guardianship not be terminated that he be permitted immediate contact and visitation upon his release. He states he should be permitted to speak with the child at least once a week, he also should be advised of Deanna Gosselin's current address and telephone number. Court Investigator Charlotte Bien's report filed 08/23/2012			

7A

Age: 8 years	JOYCE BETZ, paternal grandmother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
	DEANNA GOSSELIN and JACOB GOSSELIN, half-sister and brother-in-law, were appointed Co-Guardians of the Person and Letters were issued on 12/01/11. – present in court on 9/4/12.		Page 7A is Father, Kelly Huggins, Petition to Terminate Guardianship Continued from 9/4/12. Minute order states the parties reach an agreement as set for the by Ms. Attashian. Ms. Attashian advises the court that the parties have also agreed to continue this matter for six months to see how things progress. Additionally the parties agree to have Irene's address remain confidential. Upon inquiry from the court each party individually agrees to the terms and conditions of the agreement. Ms. Attachian is directed to prepare the order. The matter is set for review hearing on 3/4/13. If everything is progressing well, counsel will file the necessary documents to take the hearings off calendar.
Cont. from 090412			
<input type="checkbox"/> Aff.Sub.Wit.	Father: KELLY HUGGINS – consent & waiver of notice filed 07/18/12		
<input checked="" type="checkbox"/> Verified	Mother: MELISSA TOBY – present in court on 9/4/12.		
<input type="checkbox"/> Inventory	Paternal grandfather: Deceased		
<input type="checkbox"/> PTC	Maternal grandfather: Unknown		
<input type="checkbox"/> Not.Cred.	Maternal grandmother: Donna Toby		
<input type="checkbox"/> Notice of Hrg	Siblings: Jennifer Huggins, Cody Huggins, Shiloh Huggins		
<input type="checkbox"/> Aff.Mail	Petitioner states: that the current guardians have prevented the paternal family from having contact with Irene. Petitioner states that she is concerned for Irene's well-being and stability while in the care of the guardians as they both have criminal history and drug and alcohol abuse is suspected. Because the guardians have isolated Irene, the rest of her family are prevented from seeing how she is doing and the type of environment and behaviors she is being exposed to. Irene's father is scheduled to be released from Chino prison at the end of July. Petitioner states that she is willing to maintain guardianship as long as necessary to ensure appropriate and safe contact between Irene and her parents. Petitioner further states that she does not know where the guardians and Irene are currently living and believes they may have moved to Stockton.		
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<input type="checkbox"/> Letters	x		
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	x		
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Please see additional page			Reviewed by: KT Reviewed on: 2/27/13 Updates: Recommendation: File 7B - Huggins

Declaration of Keith Huggins, paternal uncle, filed 07/18/12 states that he does not believe that the Co-Guardians are in Irene's best interest. He reiterates that the Co-Guardians have past criminal and CPS history and have been isolating Irene from contact with the rest of her family. Mr. Huggin also alleges that Jacob Gosselin sells Marijuana. He further states that Petitioner Joyce Betz has virtually raised Irene since birth and has been the most stable and constant parental figure in her life. He feels that Joyce Betz is the most appropriate guardian for Irene.

Court Investigator Charlotte Bien's report filed 08/23/2012

Atty Gosselin, DeAnna (pro per –Co-Guardian-Half Sister)
 Atty Gosselin, Jacob (pro per –Co-Guardian- Brother in Law)
 Atty Toby, Melissa Mae (pro per – mother)
 Atty Huggins, Kelly (pro per Petitioner/ Father)
 Atty Attashian, Zepure (for Joyce Betz – Petitioner- Paternal grandmother)

Review Hearing

Age: 8 years		DEANNA GOSSELIN and JACOB GOSSELIN , half-sister and brother-in-law, were appointed Co-Guardians of the Person and Letters were issued on 12/01/11	NEEDS/PROBLEMS/COMMENTS: 1. Need current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from		KELLY HUGGINS , father, is petitioned the court to terminate the guardianship	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	JOYCE BETZ , paternal grandmother, petitioned the court to be appointed as successor guardian.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	At the hearing on 9/4/12 the parties reached an agreement as set for the by Ms. Attashian. Ms. Attashian advised the court that the parties have also agreed to continue this matter for six months to see how things progress. Additionally the parties agreed to have Irene's address remain confidential. Upon inquiry from the court each party individually agreed to the terms and conditions of the agreement. Ms. Attashian was directed to prepare the order. The matter was set for review hearing on 3/4/13. If everything is progressing well, counsel would file the necessary documents to take the hearings off calendar.	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	On 11/19/12 Deanna Gosselin and Jacob Gosselin filed an Ex Parte Request to Terminate the Visitation. The petition alleged that there were significant changes in the minor's behavior after visitation and that visiting with Joyce Betts and Kelly Huggins was having a damaging effect on the minor.	
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	On 11/20/12 Judge John Vogt signed an Order terminating visitation.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Reviewed by: KT	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Reviewed on: 2/27/13	
<input type="checkbox"/>	Video Receipt	Updates:	
<input type="checkbox"/>	CI Report	Recommendation:	
<input type="checkbox"/>	9202	File 7C - Huggins	
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Atty Bell, Melinda S., sole practitioner of San Juan Capistrano (for Lee Ann Hitchman and Bruce Hitchman, professional fiduciaries, Co-Trustees)

First Account and Report of Trustee; Petition to Fix and Allow Trustee Fees and Attorney Fees; Petition for Order Authorizing Payment of Trustees Fees on Account; Petition for Instruction [Prob. C. 1060, 2620, 15682, 15602(b), 17200]

Age: 12 years	LEE ANN HITCHMAN and BRUCE HITCHMAN, professional fiduciary Co-Trustees, are Petitioners.		NEEDS/PROBLEMS/COMMENTS: Note: At the time this Special Needs Trust (SNT) was established by the Court on 1/5/2012, the placement for the funds had not yet been designated by the Petitioners. Based upon this <i>First Account</i> , the Petitioners have placed the initial funds of \$229,082.06 with Merrill Lynch Wealth Management in an investment portfolio. <i>Schedule A, Receipts</i> shows dividends of \$3,098.13 have been received by the SNT; <i>Schedule B, Gains on Sales</i> shows \$3,511.27 have been received by the SNT; and <i>Schedule D, Losses on Sales</i> shows \$2,297.65 have come out of the SNT. Merrill Lynch Advisory Fees of \$874.04 have been paid from the SNT. The entirety of the \$6,653.04 in disbursements listed on <i>Schedule C</i> have been paid for bond premiums, notaries, advisory fees, and court-approved attorney fees, indicating that no funds have been paid from the SNT for special needs of Kyle Yang. Court may require information regarding what, if any, financial resources or public benefits Kyle receives that have been covering costs of his special needs during the course of the year since the establishment of this SNT on 1/5/2012. ~Please see additional page~
Cont. from	Account period: 1/5/2012 – 11/30/2012		
<input type="checkbox"/> Aff.Sub.Wit.	Accounting - \$235,691.46		
<input checked="" type="checkbox"/> Verified	Beginning POH - \$ 0.00		
<input type="checkbox"/> Inventory	Ending POH - \$226,740.77 (<i>\$45,380.86 is cash; non-cash assets consist of Merrill Lynch investment portfolio</i>)		
<input type="checkbox"/> PTC	Co-Trustees - \$1,977.50 (<i>Declaration and itemizations attached as Exhibit B, for 19.50 hours at \$75.00/hour and \$125.00/hour rates; time logs filed 1/28/2013.</i>)		
<input type="checkbox"/> Not.Cred.	Attorney - \$6,308.00 (<i>Declaration and itemization attached as Exhibit C, @ \$350.00 per hour.</i>)		
<input checked="" type="checkbox"/> Notice of Hrg	Bond - \$259,551.00 (<i>sufficient</i>)		
<input checked="" type="checkbox"/> Aff.Mail W /	Petitioners request:		
<input type="checkbox"/> Aff.Pub.	<ul style="list-style-type: none"> The Court authorize payment of Trustee fees on account pursuant to Probate Code § 15682 up to \$200.00 per month commencing 1/1/2013 (for the month of 12/2012) and continuing for a period not to exceed 12 months [<i>maximum \$2,400.00</i>], for expending ~2 hours per month at rates between \$75.00 to \$125.00 per hour based upon the duties performed; all subject to review and confirmation by the Court at the time of the next accounting; 		
<input type="checkbox"/> Sp.Ntc.	~Please see additional page~		
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/S			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input checked="" type="checkbox"/> 2620			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCC/JEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 2/28/13
			Updates:
			Recommendation:
			File 8 - Yang

Petitioners request, continued:

- Instructions from the Court regarding payment of a Public Benefits Advocate / Government Benefits Advisor, which by the Trust terms the Trustee is authorized to engage the services of a Government Benefits Advisor to advise the Trustee concerning the availability of government benefits for the beneficiary, including but not limited to Supplemental Security Income (SSI) and Medi-Cal, which the beneficiary is not currently receiving but may be entitled to, as well as In Home Support Services (IHSS) and Regional Center Benefits; Petitioner anticipates the Trustees will spend and requests Court authorization to spend up to **\$3,000.00**, subject to review of this Court at the next hearing, for the following:
 - a. Engage a Government Benefits Advisor to up to **12 hours** of counsel, at an hourly rate of **\$250.00** [maximum **\$3,000.00**] to ensure Kyle Yang receives SSI, Medi-Cal, IHSS and Regional Center benefits, as well as any and all other public benefits he may be entitled to;
 - b. Public Benefits Advocate / Government Benefits Advisor will act as an advocate and consultant to assist the Trustee in fulfilling the SNT's requirement to access public benefit resources for the beneficiary in order to protect and preserve the beneficiary's trust funds; this is accomplished through direct assistance to the beneficiary and his family in becoming eligible for, and maximizing receipt of, government benefits programs including but not limited to the California Regional Centers, Medi-Cal, Supplemental Security Income (SSI), California Children's Services, IHSS, the public schools and other governmental agencies; the Public Benefits Advocate / Government Benefits Advisor makes recommendations to the Trustees regarding needs of the beneficiary, which cannot be met through public resources and may be best met through funding from the beneficiary's trust.

Petitioners pray for a Court Order:

1. Settling, allowing, and approving the First Account and Report of the Trustee, and ratifying, confirming and approving all acts and transactions of Petitioners set forth in it;
2. Authorizing payment of the Trustee and attorney fees;
3. Authorizing the Trustees to pay themselves from the Trust estate up to **\$200.00** per month on account for Trustees compensation beginning 1/1/2013 for a period not to exceed 12 months or until further order of this Court; and
4. Authorizing and directing the Petitioners to pay an amount up to **\$3,000.00** to a Public Benefits Advocate / Government Benefits Advisor.

NEEDS/PROBLEMS/COMMENTS, continued:

Note: Declaration of Lee Ann Hitchman and Bruce Hitchman in Support of Trustee's Fee Request indicates that one of the benefits of their services to the Kyle Yang Special Needs Trust is that family members were contacted so as to encourage them to establish a budget for the SNT. Paragraph 15 of the Declaration states: "the Trustees have contacted the family several times reminding them that the trust is available and is expected to be used for the benefit of Kyle. To date, significant requests have not been made, despite these attempts." Court may require further information regarding the nature of this contact by Petitioners with this primarily Hmong-speaking family for the Court's consideration of the need for types and frequency of SNT expenditures for addressing the special needs of Kyle Yang.

~Please see additional page~

NEEDS/PROBLEMS/COMMENTS, continued:

Note: This Court established on 1/5/2012 this Special Needs Trust with Kyle Yang as the beneficiary, funded with the proceeds of a litigation settlement in Fresno Superior Court Minor's Compromise Case #07CECG03870. Kyle Yang is a 12-year-old minor who was involved in a house fire and sustained severe and extensive second and third degree burns to his face, neck, and both upper extremities which cover 18% of his total body surface; he has been diagnosed with "Post-Traumatic Stress Disorder, Major Depressive Disorder, Reading Disorder, and Insomnia." The SNT authorizes Trustee to utilize a "Government Benefits Advisor" and a "Care Manager" which are not standard services our Court typically comes across as advantageous expenditures from a special needs trust, though it appears in this particular case that such a service provider may be appropriate given that the beneficiary's family is primarily Hmong-speaking and these may not be ordinary services provided by the Trustees. Caution must be exercised by the Court in allowing the **\$3,000.00** expenditure without having any idea of whether any public benefits will actually be obtained for the beneficiary by the Government Benefits Advisor, other than those Kyle Yang currently may receive but which have not to date been disclosed by Petitioners. Court may not authorize the amount requested at this time, or alternatively, may require Petitioners only be authorized to pay up to **\$1,500.00** to the Public Benefits Advocate / Government Benefits Advisor representing half of Petitioner's request at this time, with **\$1,500.00** potentially allowed at the time of the next accounting upon a showing that eligibility for benefits and actual benefits have been received by Kyle Yang.

Note: Verified Supplement to Petition for Order Establishing Special Needs Trust filed 1/3/2012 prior to the establishment of this SNT, indicates that Petitioner anticipates the Trustees will spend and requests Court authorization up to **\$2,500.00** to a Government Benefits Advisor to up to **11.1 hours** of counsel, at an hourly rate of **\$225.00** to investigate and/or implement Regional Center benefits, California Children's Services (CCS) and/or SSI, as well as any and all other public benefits he may be entitled to. The *Order Establishing the Kyle Yang Irrevocable Special Needs Trust* filed 1/5/2012 did not grant this authority to the Trustees; this may be the reason the request is being made in the instant *Petition for Instruction*. Court may require additional information for regarding whether **JAMES HUYCK** would be the Public Benefits Advocate / Government Benefits Advisor selected by Trustees if authorized by this Court, as was originally indicated by Petitioners in the *Supplement* filed 1/3/2012.

Note: Court will set a status hearing as follows:

- **Friday, May 2, 2014 at 9:00 a.m. in Dept. 303** for filing of the next accounting.

Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the dates listed, the hearing will be taken off calendar and no appearance will be required.

Age: 7		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		PAO VANG , father, is Petitioner.		1. Petitioner was granted a fee waiver. However, since the guardianship estate will be receiving money, the filing fee of \$435.00 and any other accrued court fees will be due and payable to the Court upon receipt of the funds.	
		Mother: MAI YANG - deceased		2. Need Letters.	
Cont. from		Paternal grandfather: CHER CHAI CHANG		<p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Friday, 05/24/13 at 9:00a.m. in Dept. 303 for Receipt and Acknowledgement of Order for the Deposit of Money into Blocked Account • Friday, 07/12/2013 at 9:00a.m. in Dept. 303 for filing of the inventory and appraisal <u>and</u> • Friday, 05/09/14 at 9:00a.m. in Dept. 303 for the filing of the first account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>	
	Aff.Sub.Wit.	Paternal grandmother: YIA YANG – Consent & Waiver of Notice filed 01/22/13			
✓	Verified	Maternal grandparents: DECEASED – Consent & Waiver of Notice filed 01/22/13			
	Inventory	Siblings: PHIA LOR, PONGZE LOR, SHENG LOR, ZONG LOR, YER LOR – all served by mail on 02/04/13			
	PTC	Petitioner states that the minor is a beneficiary of a life insurance policy of his deceased mother. A guardianship of the estate is necessary in order to collect the proceeds of the life insurance policy. All proceeds of the life insurance policy are to be placed into a blocked account			
	Not.Cred.	Estimated Value of the Estate:			
✓	Notice of Hrg	Personal property - \$6,300.00			
✓	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	n/a			
✓	Conf. Screen				
	Letters	x			
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report	n/a			
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 02/26/13	
				Updates:	
				Recommendation:	
				File 9 - Cha	

Probate Status Hearing Re: Filing First Account and Inventory & Appraisal

DOD: 4-19-04		<p>STEPHEN RONALD CLOUD was appointed Executor with full IAEA without bond on 8-29-06 and Letters Issued 8-30-06.</p> <p>Inventory and appraisal was due 12-29-06.</p> <p>First account or petition for final distribution was due 8-30-07.</p> <p>Status Report filed 11-6-12 by attorney Perkins states this estate is dependent on the receipt of assets from the conservatorship estate. The Conservator has refiled his Sixth and Final Account that is set for hearing on 12-13-12. Immediately upon settling, Executor will prepare and file an Inventory and Petition for Final Distribution to close the decedent's estate.</p> <p>Declaration of Stephen Ronald Cloud in Response to Order to Show Cause filed 11-6-12 states he was not able to file an inventory or otherwise proceed because the conservatorship assets have not yet been delivered to the estate. Executor hopes the Court will realize that he has done all he could to act as Executor and hopes that he will not be sanctioned. Executor sincerely apologizes to the Court and its staff for the unusual amount of the Court's time that has been taken while he has tried to conclude the Conservatorship and this matter.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> An amended accounting has been filed in the related conservatorship estate (0458379). See Page 2 of this calendar.</p>
Cont from 121312, 011413, 021113			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 2-27-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 - Cloud</p>	

**Petition for Removal of Trustee, Account, and for Appointment of
Successor Trustee**

		ANDREW CHAFFER , trust beneficiary, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states he is the grandson and 1/6 beneficiary under the HARLEY E. CHAFFER TRUST executed May 9, 1991. Petitioner states he does not possess a copy of the Trust. And amendment to the Trust was executed on October 29, 1998.	Note: Petitioner was formerly represented by Attorney John Streett; however, Substitution of Attorney filed 9-12-12 indicates that he is now self-represented.
Cont. from 121211, 022712, 040912, 051412, 062512, 080612, 091712, 102212, 111912, 021113		Harley E. Chaffer died on March 4, 2011 thereby making the Trust irrevocable.	Minute order 4/9/12 (Judge Oliver): Doug Chaffer is ordered to send 2/11 and 3/11 bank statements to Mr. Streett. Mr. Chaffer is also ordered to send any life insurance information to Mr. Streett.
	Aff.Sub.Wit.	Petitioner is informed and believes that the successor Trustee is DOUGLAS EDWARD CHAFFER .	Minute Order 5/14/12 (Judge Oliver): Mr. Streett is appearing via conference call. Matter continued to 6/25/12
✓	Verified	Petitioner alleges:	Minute Order 6/25/12 (Judge Oliver): Mr. Streett is appearing via conference call. Doug Chaffer is directed to submit an inventory of the jewelry to the Court and counsel. In addition, he is to obtain a list from his sister setting forth the distribution of the jewelry.
	Inventory	1. The Trustee has violated his duty to inform the beneficiaries and has refused to provide Petitioner with a copy of the Trust, despite written requests.	<i>Declaration filed 7-23-12 attaches an email from Janet Payne to Douglas Chaffer listing jewelry and distribution and copies of appraisals of various pieces.</i>
	PTC	2. The Trustee has violated his duty to Petitioner as Trustee has failed to ever render an accounting despite written request to do so.	Minute Order 8-6-12 (Judge Oliver): John Streett appeared via Courtcall. Mr. Streett informed the court that he received notice that he will no longer be counsel for Andrew Chaffer. This matter is continued and Mr. Streett will inform Andrew Chaffer with the new date. Matter continued to 9-17-12.
	Not.Cred.	Wherefore, Petitioner prays for an Order:	Minute Order 9-17-12 (Judge Nunez): Andrew Chaffer is appearing via conference call. Mr. Chaffer advises the Court that he is in the process of retaining new counsel, but will have a copy of the trust mailed to the Court.
✓	Notice of Hrg	1. Compelling Douglas Edward Chaffer to produce a copy of the Harley E. Chaffer Trust of May 9, 1991 and all amendments to it;	Minute Order 10-22-12 (Judge Snauffer): Andrew Chaffer is appearing via conference call. Andrew Chaffer informs the Court that he has been unable to retain new counsel to address the discrepancies in the accounting. The Court directs Andrew Chaffer to submit a copy of the trust. Continued to 11/19/12.
✓	Aff.Mail		Minute Order 11-19-12 (Judge Hamilton): Due to technical difficulty, the Court was unable to connect with the Courtcall appearance of Andrew Chaffer. Matter continued to 2-11-13.
	Aff.Pub.		Minute Order 2-11-13 (Judge Vogt): Petitioner not present. Doug Chaffer present. Matter continued to 3-4-13
	Sp.Ntc.		Reviewed by: skc
	Pers.Serv.		Reviewed on: 2-27-13
	Conf. Screen		Updates:
	Letters		Recommendation:
	Duties/Supp		File 11 - Chaffer
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Age: 8 months Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%;">Aff.Sub.Wit.</td><td style="width: 50%;"></td></tr> <tr><td><input checked="" type="checkbox"/> Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td style="text-align: center;">x</td></tr> <tr><td>Aff.Mail</td><td style="text-align: center;">x</td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td style="text-align: center;">x</td></tr> <tr><td><input checked="" type="checkbox"/> Conf. Screen</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Letters</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		<input checked="" type="checkbox"/> Verified		Inventory		PTC		Not.Cred.		Notice of Hrg	x	Aff.Mail	x	Aff.Pub.		Sp.Ntc.		Pers.Serv.	x	<input checked="" type="checkbox"/> Conf. Screen		<input checked="" type="checkbox"/> Letters		<input checked="" type="checkbox"/> Duties/Supp		Objections		Video Receipt		<input checked="" type="checkbox"/> CI Report		9202		<input checked="" type="checkbox"/> Order		Aff. Posting		Status Rpt		<input checked="" type="checkbox"/> UCCJEA		Citation		FTB Notice		<p style="text-align: center;"><u>TEMPORARY EXPIRES 03/04/13</u></p> <p>ROSEMARIE ANITA CHAVEZ-GONZALEZ, maternal grandmother, is Petitioner.</p> <p>Father: UNKNOWN – <i>Court Dispensed with Notice on 01/17/13</i></p> <p>Mother: ARLENE DELEON</p> <p>Paternal grandparents: UNKNOWN</p> <p>Maternal grandfather: RUBEN GARCIA</p> <p>Siblings: Moses DeLeon, Joseph DeLeon, Jesse DeLeon, Richard DeLeon</p> <p>Petitioner alleges that the mother is addicted to meth and has abandoned the minor. The mother was convicted of multiple offenses and is looking at service 6 or more months in jail. Petitioner states that guardianship is needed because she has no way to reach the mother in the case of an emergency.</p> <p>Court Investigator Julie Negrete filed a report on 02/19/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ul style="list-style-type: none"> - Arlene DeLeon (mother) - Father (unknown) 3. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ul style="list-style-type: none"> - Paternal grandparents (unknown) - Ruben Garcia (maternal grandfather) - Any siblings that are 12 and over. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr><td>Reviewed by: JF</td></tr> <tr><td>Reviewed on: 02/27/13</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 12 - Chavez</td></tr> </table>	Reviewed by: JF	Reviewed on: 02/27/13	Updates:	Recommendation:	File 12 - Chavez
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Recommendation:																																																					
File 12 - Chavez																																																					

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 12		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		JUAN CRUZ, JR., step-father, is Petitioner.	1. Need <i>Notice of Hearing</i> .
		Father: UNKNOWN	2. Need proof of personal service at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
Cont. from		Mother: ELIZABETH I. NIXON – <i>currently incarcerated</i>	- Elizabeth I. Nixon (mother)
<input type="checkbox"/>	Aff.Sub.Wit.		- Father (unknown)
✓	Verified		- Bailey Nixon (minor)
<input type="checkbox"/>	Inventory	Paternal grandparents: UNKNOWN	
<input type="checkbox"/>	PTC		3. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:
<input type="checkbox"/>	Not.Cred.	Maternal grandfather: DECEASED	- Paternal grandparents (unknown)
<input type="checkbox"/>	Notice of Hrg	Maternal grandmother: PATRICIA ZAGOYA	- Patricia Zagoya (maternal grandmother)
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	Petitioner alleges that Bailey's mother has been incarcerated in Arizona since 2010 and Bailey has been living with him. Petitioner states that he has been Bailey's stepfather since birth, but has recently divorced his mother. Petitioner states that guardianship is necessary so that he can add Bailey to his health insurance.	4. Need UCCJEA.
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
✓	CI Report	Court Investigator Jo Ann Morris filed a report on 02/25/13.	
<input type="checkbox"/>	9202		
✓	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 02/27/13
			Updates:
			Recommendation:
			File 13 - Nixon

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Jauron (10)	TEMP DENIED 1-14-13 (no appearances)		NEEDS/PROBLEMS/COMMENTS:
Jaekwon (8)	JENNIFER NICOLE HAYNIE-EDWARDS , Sister, is Petitioner.		
	Father: JOSEPH WAYNE HAYNIE, SR. Mother: LUWANA (Last name not listed)		1. If this matter goes forward, continuance is necessary to complete an investigation and clearances. See Court Investigator's Report filed 2-27-13.
	Paternal Grandfather: Deceased Paternal Grandmother: Erma-Jean Ricks		
	Maternal Grandfather: Not listed Maternal Grandmother: Not listed		2. Need Notice of Hearing.
	Siblings: Joseph Wayne Haynie, Jr., Brian J. Haynie, Jeremy Haynie, Julon Haynie, Deswyn King, Tyrese Darbargild, Dwana Chaney (ages not listed)		
	Petitioner states the father who has custody is homeless and has asked her to get guardianship over her brothers. A letter from the father is attached. She needs to be able to enroll the children in school and take them to the doctor. Petitioner is a Housing Authority participant and needs guardianship to put them on her Section 8 so that she will be in compliance with housing. Petitioner states the father has a long history of drug use. Per the UCCJEA, the children have been with Petitioner since October 2012.		3. Need proof of personal service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Father - Joseph Wayne Haynie, Sr. - Mother - Luwana (Last name not listed)
	Court Investigator Jennifer Young filed a report on 2-27-13.		
			4. Need proof of service of Notice of Hearing with a copy of the Petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Erma-Jean Ricks - Maternal Grandfather - Maternal Grandmother
			5. Petitioner's Confidential Guardian Screening Form is blank at #10. The Court may require clarification.
			Reviewed by: skc
			Reviewed on: 2-27-13
			Updates: 2-28-13
			Recommendation:
			File 14 - Haynie

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13 years		TEMPORARY EXPIRES 3/4/2013		NEEDS/PROBLEMS/COMMENTS:	
Cont. from					
	Aff.Sub.Wit.				
✓	Verified	Father: WILLIAM ANTHONY SANTOS		1. Petition does not include the names and addresses of the paternal grandfather and the maternal grandparents.	
	Inventory	Mother: VIVA GARCIA		2. Need proof of <u>personal</u> service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice, or Declaration of Due Diligence on:	
	PTC	Paternal grandfather: not listed		a. William Anthony Santos (father)	
	Not.Cred.	Maternal grandparents: not listed		b. Viva Garcia (mother)	
✓	Notice of Hrg			c. Abrina N. Santos (minor)	
✓	Aff.Mail	Petitioner states mother has left the minor with petitioner and she does not want to take care of her.		3. Need proof of service of the Notice of Hearing along with a copy of the Petition, or Consent and Waiver of Notice, or Declaration of Due Diligence on:	
	Aff.Pub.			a. Paternal grandfather	
	Sp.Ntc.	Court Investigator Samantha Henson's Report filed on 2/26/13.		b. Maternal grandfather	
	Pers.Serv.			c. Maternal grandmother	
✓	Conf. Screen			4. Need Duties of Guardian	
✓	Letters			5. UCCJEA is incomplete. Need residence information for the minor for 2007 – 9/20012.	
	Duties/Supp	X			
	Objections				
	Video Receipt				
✓	CI Report			Reviewed by: KT	
	9202			Reviewed on: 2/27/13	
✓	Order			Updates:	
	Aff. Posting			Recommendation:	
	Status Rpt			File 15 - Santos	
✓	UCCJEA				
	Citation				
	FTB Notice				

Petition for Probate of Will and for Letters Testamentary; Authorization to
Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/14/2012		KURT JOHN BREMENKAMP , named executor without bond, is petitioner. Full IAEA – o.k. Will dated: 2/25/2007 Residence: Clovis Publication: Fresno Business Journal <u>Estimated value of the Estate:</u> Personal property- \$ 50.00 Real property- \$150,000.00 Total - \$150,050.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: 1. Need date of death of deceased spouse pursuant to Local Rule 7.1.1D. 2. #5a(3) or 5a(4) of the petition was not answered re: registered domestic partner. 3. #5a(7) or 5a(8) of the petition was not answered re: issue of predeceased child. 4. #8 of the petition does not include the names and addresses of all persons named in the decedent's will. #8 fails to include: Dawn Kunz, Jennifer Bremenkamp, Joshua Bremenkamp, Kristopher Bremencamp, Michael Kunz, Rebecca Bremencamp and Yvonne Kunz. 5. #8 of the petition lists Sandra Lee Bremenkamp however the will has Sandra Lee Kunz. <u>Note:</u> If the petition is granted, status hearings will be set as follows: • Friday, July 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. <u>Note:</u> an inventory and appraisal was filed however the property was not appraised by the probate referee as required. • Friday, March 28, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required. Reviewed by: KT Reviewed on: 2/27/13 Updates: Recommendation: File 16 - Bremenkamp
Cont. from			
✓	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail W/		
✓	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Atty Cabrera, Augustina (pro per Guardian/maternal great-aunt)

Atty Sanchez, Stacy (pro per Petitioner/maternal aunt)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Gabriella age: 17 Richard age: 16 Daniel age: 12 Cont. from <table border="1"> <tr> <td></td> <td>Aff.Sub.Wit.</td> <td></td> </tr> <tr> <td>✓</td> <td>Verified</td> <td></td> </tr> <tr> <td></td> <td>Inventory</td> <td></td> </tr> <tr> <td></td> <td>PTC</td> <td></td> </tr> <tr> <td></td> <td>Not.Cred.</td> <td></td> </tr> <tr> <td></td> <td>Notice of Hrg</td> <td>X</td> </tr> <tr> <td></td> <td>Aff.Mail</td> <td></td> </tr> <tr> <td></td> <td>Aff.Pub.</td> <td></td> </tr> <tr> <td></td> <td>Sp.Ntc.</td> <td></td> </tr> <tr> <td></td> <td>Pers.Serv.</td> <td>X</td> </tr> <tr> <td>✓</td> <td>Conf. Screen</td> <td></td> </tr> <tr> <td>✓</td> <td>Letters</td> <td></td> </tr> <tr> <td>✓</td> <td>Duties/Supp</td> <td></td> </tr> <tr> <td></td> <td>Objections</td> <td></td> </tr> <tr> <td></td> <td>Video Receipt</td> <td></td> </tr> <tr> <td></td> <td>CI Report</td> <td></td> </tr> <tr> <td></td> <td>9202</td> <td></td> </tr> <tr> <td>✓</td> <td>Order</td> <td></td> </tr> <tr> <td></td> <td>Aff. Posting</td> <td></td> </tr> <tr> <td></td> <td>Status Rpt</td> <td></td> </tr> <tr> <td>✓</td> <td>UCCJEA</td> <td></td> </tr> <tr> <td></td> <td>Citation</td> <td></td> </tr> <tr> <td></td> <td>FTB Notice</td> <td></td> </tr> </table>			Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	X		Aff.Mail			Aff.Pub.			Sp.Ntc.			Pers.Serv.	X	✓	Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt		✓	UCCJEA			Citation			FTB Notice		<p align="center"><u>GENERAL HEARING 4/17/13</u></p> <p>STACY SANCHEZ, maternal aunt, is petitioner.</p> <p>AUGUSTINE CABRERA, maternal great-aunt, was appointed guardian n 1/14/10.</p> <p>Father: RICHARD MARIN</p> <p>Mother: PHYLISS MARIN</p> <p>Paternal grandfather: Gilidoro Marin Paternal grandmother: Elvira Marin Maternal grandfather: Richard Tercero Maternal grandmother: Emelia Caballero</p> <p>Petitioner alleges it is rare that she sees her niece and nephews because her aunt will not allow it. However on Thursday, 2/7 of this year she saw Richard Jr. and he had scratches on his neck. Petitioner states she found out that her aunt's 50 year old renter, struck the minor and gave him some scratches. This is not an isolated incident and the guardian knows about it and does nothing. In fact she allows her older children to beat on her nephews. Not only have they undergone emotional abuse but the guardian also hides the food from them and will not allow them to go into the refrigerator.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A Petition to Terminate the Guardianship has been filed by this petitioner and is set for hearing on 4/17/13.</p> <ol style="list-style-type: none"> 1. There is currently no vacancy in the office of guardian. 2. Need Notice of Hearing. 3. Need proof of personal service of the Notice of Hearing along with a copy of the Temporary Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Augustine Cabrera (guardian) b. Richard Marin (father) c. Phyliss Marin (mother) d. Gabriella Marin (minor) e. Richard Marin, Jr. (minor) f. Daniel Marin (minor)
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